

SELF-SERVICE CENTER
PROCEDURES REGARDING
PROOF BY DEPOSITORY OF RESTRICTED ACCOUNT
(CONSERVATORSHIP)

1. **WHEN YOU NEED A PROOF BY DEPOSITORY:** If you are a conservator of a ward's money, you might have asked the Judge/Commissioner to order that some or all of the assets be restricted. If the Judge/Commissioner granted the restriction, you need to prove to the Judge/Commissioner that you obeyed the Order and had the assets placed in a restricted account. This court document is called the PROOF OF RESTRICTED ACCOUNT.
 2. **WHEN AND HOW TO GET A "PROOF OF RESTRICTED ACCOUNT:**
Immediately after the Judge/Commissioner orders the restriction, take the money to a bank or other financial institution and inform the manager or staff that:
 - You are a conservator under court order. Bring with you a **certified copy** of the LETTERS OF APPOINTMENT.
 - You want the money placed in a restricted account as stipulated by the ORDER. Bring a copy of the ORDER authorizing the restriction. There are certain terms in the ORDER you and the financial institution need to obey.
 - After the money is deposited in a restricted account, have the bank or financial institution manager sign the PROOF OF RESTRICTED ACCOUNT, which must also be notarized. **Keep the original to give it to the court.**
 3. **FILING THE PROOF BY DEPOSITORY:** After the PROOF OF RESTRICTED ACCOUNT is signed and notarized, file the original with the **Clerk of the Court, Probate Registrar**. You should also send a copy to **Probate Court Administration**.
- Note:** You should also send a copy to the office of the Judge/Commissioner who signed the Order for the restricted account.
4. **WHAT ABOUT THE BOND:** Once the account is established and the PROOF OF RESTRICTED ACCOUNT is filed, you might qualify to have the bond reduced or dissolved, depending on the estate and what the ORDER said. If so, you might need an extra **conformed (date-stamped) copy** of the PROOF OF RESTRICTED indicating that the restricted account is established and the proof is filed in the court records.
 5. **OTHER HELP:** If you still have questions about this procedure, you can ask a lawyer for legal advice. You can look up a lawyer in the telephone book under "attorneys." Also, the Self-Service Center has a list of lawyers who will help you help yourself. The list shows where the lawyers are located, how much they charge, and what their experience is.